

# **SAN BERNARDINO ASSOCIATED GOVERNMENTS**

## **REQUEST FOR PROPOSALS C07027**

### **PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION COORDINATION PLAN FOR SAN BERNARDINO COUNTY**

**Proposals Due: 4:00 p.m., September 8, 2006**

**REQUEST FOR PROPOSALS C07027**  
**PUBLIC TRANSIT-HUMAN SERVICES**  
**TRANSPORTATION COORDINATION PLAN**  
**FOR**  
**SAN BERNARDINO COUNTY**

**A. BACKGROUND**

The Safe, Accountable, Flexible, Efficient Transportation Equity Act – *A Legacy for Users* (SAFETEA-LU) requires that projects receiving funds from either Section 5310 (Elderly Individuals and Individuals with Disabilities), Section 5316 (Job Access and Reverse Commute), and Section 5317 (New Freedom) be derived from a public transit-human service transportation coordination plan beginning in FFY 2007.

Section 5310 provides capital assistance for the purchase of vehicles and associated equipment by non-profit agencies for the provision of transportation to elderly individual and individuals with disabilities for whom mass transportation services are unavailable, insufficient or inappropriate. Under certain circumstances public agencies may receive these funds where it is demonstrated that there are no non-profit organizations readily available to provide the specialized service. The Section 5310 is apportioned to the State of California which conducts an annual competitive application process through the Department of Transportation and project awards are granted by the California Transportation Commission.

The Section 5316 and 5317 are apportioned as follows: 60% to large urban areas (over 200,000 population), 20% to small urban areas (between 50,000 and 200,000) and 20% to rural areas (less than 50,000 population). Section 5316 funds must be used for projects that relate to the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment. Section 5317 must be used for projects for new and/or existing public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act of 1990.

The San Bernardino Associated Governments is seeking consultant assistance for the development of a public transit-human service coordination plan for San Bernardino County. The coordination plan must be developed in a manner that allows for projects to be selected based on the how these three program funds will be made available as well as give consideration to the very unique areas that comprise a County of 20,000 square miles and a population of 1.99 million. The plan must address public transit-human services transportation coordination within each of the six subareas described below and shown in Appendix A.

The San Bernardino Valley is bordered by the Los Angeles, Orange and Riverside Counties on the west and south and the San Gabriel and San Bernardino Mountains to the north and east and is comprised of approximately 480 square miles and a population of nearly 1.5 million. Within the San Bernardino Valley the western communities of Chino Hills, Chino, Ontario, Montclair, Upland and Rancho Cucamonga are part of the greater Los Angeles/Long Beach/Santa Ana Urbanized Area. The eastern communities of Fontana, Rialto, San Bernardino, Colton, Grand Terrace, Highland, Loma Linda, Redlands and Yucaipa are part

of the Riverside/San Bernardino Urbanized Area. Approximately \$3.76 million and \$1.48 million Sections 5316 and 5317 respectively are expected to be made available to the San Bernardino Valley from FFY 2006 through FFY 2009.

The Victor Valley with a population of nearly 335,000 is comprised of both a large urban area and a rural area. The urbanized area general consists of the Town of Apple Valley and the Cities of Hesperia and Victorville and a small portion of Adelanto. The Victor Valley is expected to receive apportionments of \$571,000 and \$240,000 from Sections 5316 and 5317 respectively from FFY 2006 through FFY 2009.

The balance of the County is divided into following four subareas: Mountains (City of Big Bear Lake and unincorporated communities of Big Bear City, Crestline, Lake Arrowhead and Running Springs) with a population of 52,700; North Desert (City of Barstow and unincorporated communities of Hinkley, Yermo, Daggett, Baker and Trona) with a population of 58,800; Colorado River (City of Needles and unincorporated communities of Lake Havasu and Big River) with a population of 8,100); and the Morongo Basin (Town of Yucca Valley, City of Twentynine Palms and the unincorporated communities of Joshua Tree and Landers) with a population of 73,200. These rural areas along with the rural portion of the Victor Valley will be eligible to submit projects for Sections 5316 and 5317 to the State through the Department of Transportation. It is estimated that the statewide apportionments of Section 5316 and 5317 for rural communities will be \$6.1 million and \$3.0 million respectively from FFY 2006 through FFY 2006.

Since the State currently administers the Section 5310 program, all areas of the County will be eligible to compete for the estimated \$51.1 million that is expected to be apportioned to California from FFY 2006 through FFY 2009.

The public transit-human services transportation plan must also take into consideration the various State and Federal funding sources that support human services transportation. Recent efforts at the federal level have documented 64 Federal programs, sponsored by nine Federal departments, where some type of transportation services is an allowable use of funds.<sup>1</sup>

Coordination of public transit and human services transportation services has long been a topic of discussion at Federal and state levels, as well as within San Bernardino County. Coordinating public transit and human services transportation is seen as way of maximizing the scarce resources available for such service and providing individuals with the particular transportation that they require for getting to work, needed programs or health services. Coordination has been formally defined as:

*“a process through which representatives of different agencies and client groups work together to achieve any one or all of the following goals: more cost-effective service delivery; increased capacity to serve unmet needs; improved quality of service; and services which are more easily understood and accessed by riders.”<sup>2</sup>*

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<sup>1</sup> United We Ride Coordinating Human Service Transportation, Transit ITS Deployment Tracking Progress Report and Preliminary Agency Responses, 2004.

<sup>2</sup> Planning Guidelines for Coordinated State and Local Transportation Services, Federal Transit Administration, December 2000, p. ii.

At the Federal level, the history of formal coordination dialogue began in the late 1970's, rejuvenated in the late 1990's with the formation of the *Interagency Transportation Coordinating Council on Access and Mobility* (CCAM). This established a setting for dialogue with a coalition of the US Departments of Transportation, Health & Human Services, Education, Agriculture, Labor and others.

The 2005 reauthorization of Federal transportation funding under SAFETEA-LU, reflects renewed attention to coordination, specifically in three programs: the Elderly Individuals and Individuals with Disabilities (Section 5310), Jobs Access and Reverse Commute (Section 5316) and the New Freedoms Initiative (Section 5317). Local and regional jurisdictions will be required to develop coordination plans in order to secure access to these, and potentially other, funds. Developing a public transit-human services coordination plan for San Bernardino County's future is the focus of this effort.

## **B. LOCAL CONDITIONS**

### **1. Approach To Coordination In San Bernardino County**

The coordination of public transit and human services transportation in San Bernardino County has focused on several areas since 1990 when a major coordination study was conducted to examine the opportunities and challenges that were unique to the County at that time. That study identified three goals which have formed the basis for transportation coordination initiatives since then, specifically:

- To develop an interacting network of public transit and human services transportation services among the six subareas of the County.
- To develop and implement programs of cooperation, coordination, consolidation and brokerage of functions useful to the transportation services of social service agencies.
- To assist the public operators in responding to the mandates of the Americans with Disabilities Act through establishment of appropriate county-wide policy and the provision of selected countywide participating opportunities in the planning process.

Among the regional and countywide responses to these goals have been the following:

- **Directory** -- the annual publication of a public transit-human services transportation directory to enable agencies to identify one another, to support coordination, and to have annually updated access information to the public transportation operators around the county.
- **PASTACC** -- the regular convening of an advisory body of 35 or so regular members who meet for purposes of mutual education about transportation-related issues that impact these funding and operating agencies and, on occasion, to provide comment to SANBAG and to state entities.
- **ADA Implementation** -- the initial implementation of the Americans with Disabilities Act was guided by service standards developed by PASTACC; subsequent issues over the past fifteen years have been reviewed and coordinated through PASTACC.
- **Annual coordination of Section 5310 capital grant program and county unmet transit needs public hearings** -- largely through PASTACC, San Bernardino has provided outreach and support to individuals and agencies to alert them of the

Section 5310 grant opportunities and to ensure public participation in the annual determination of unmet transportation needs that could reasonably be met.

- **Non-emergency medical transportation** – a study of statewide planning significance was completed in 2005 for San Bernardino and Riverside Counties, SANBAG was the lead agency and with PASTACC membership on the Project Management Team. This was a significant initiative, and a beginning effort, to promote coordination between health care partners and the public transportation agencies of San Bernardino County.

## **2. Issues That Confront San Bernardino County**

There are features of San Bernardino County that make coordination particularly challenging. These include **considerable geographic expanses**, with concentrated employment, regional health and social services facilities in the San Bernardino Valley and county residents traveling long distances from elsewhere in the county to these destinations. Its **development patterns** are not conducive to public transportation with disbursed, low-density housing of cities in the San Bernardino Valley and the recently urbanized Victor Valley; similar low-density housing in rural Barstow, the mountain communities including Lake Arrowhead and City of Big Bear Lake, and those of the Morongo Basin including Joshua Tree, Town of Yucca Valley and City of Twentynine Palms. This county is typified by **challenging demographics**, with the Inland Empire population of San Bernardino and Riverside adding 1.78 million persons between now and 2020, reaching 6 million persons. This is more new residents than will be added in all but seven U.S. states during this same time period.<sup>3</sup> Population impacts of **traffic congestion** and significant rates of under-employment currently typify some areas of the county. And while employment for this growing population is now largely out-of-county, there area trends suggesting a stronger employment sector within the Inland Empire, creating more professional level jobs.<sup>3</sup>

San Bernardino County's public transportation services are delivered by seven public transit operators, **Omnitrans** in the San Bernardino Valley and the **Victor Valley Transit Authority** in the high desert, each operating in urbanized areas. Smaller operators provide public transportation in four sub-regions: **Barstow Area Transit, the Morongo Basin Transit Authority, Mountain Area Transportation Authority** and **Needles Area Transit**. Very small programs in Big River, Lake Havasu and Trona provide some service for these desert towns. **Metrolink** provides high-speed passenger rail service into Los Angeles, Riverside and Orange Counties from San Bernardino's Santa Fe Depot. Currently there are three Metrolink lines serving the San Bernardino Valley. Reverse commute service was recently added and is showing steady ridership increases. Regional passenger rail service is a critical link between this county and the greater Los Angeles metropolitan region. The county's public operators will have a continuing and significant future role in any coordination initiatives developed for San Bernardino County.

Recent activities in San Bernardino County are fostering an improved environment for coordination of public transit and human services transportation. These may be possible to build upon, in terms of establishing coordination strategies for the future. These include:

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<sup>3</sup> Inland Empire Quarterly Economic Report, "Inland Empire's Office Market Coming to Life", Vol. 18, No. 1, January 2006.

- The 2003-2004 **non-emergency medical transportation** § 5313 planning study that involved partnerships with several of the major health care providers and the county's transportation services. While this study has not yet resulted in significant action within San Bernardino County, the dialogue begun represents a foundational base for future coordination efforts. (Appendix B includes a summary of this study's approach and findings.)
- Various **health coordination initiatives** are underway between public health, community hospitals, and significant private sector representatives, potentially affording opportunity to link transportation initiatives to some of these pilot efforts.
- The **San Bernardino First Five strategic planning efforts** in the past couple of years involved agency directors in developing comprehensive plans for the distribution of the tobacco revenue settlement funds. Recommendations addressed the need for improved infrastructure and coordination of information among service systems used by children and their families, including transportation.
- A **coalition of organizations serving homeless persons** in San Bernardino is moving forward with a one-stop facility where individuals can get access to an array of services at a single location.
- The current sbX planning process for the design and construction of a **high speed bus service** in several north-south and east-west San Bernardino Valley corridors has brought together players who have not otherwise considered the mobility issues of San Bernardino residents.
- **Focused development along transit corridors** has been underway as a policy of various city and regional planners, encouraging development within defined transit corridors to build densities and trip generators in anticipation of increased transit frequencies.

## C. SCOPE OF WORK FOR COORDINATION PLAN

### Plan Objectives:

1. To develop a public transit-human services coordination plan to guide the selection of projects for Sections 5310, 5316 and 5317 within and between the six subareas of San Bernardino County for the next 4 years (Fiscal Year 2007/2008 through 2010/2011).
2. To expand stakeholders participation to both a broader group of agencies and a higher level of agency participation.
3. To establish a data collection foundation that builds upon information gathered annually through the public transit-human services transportation inventory and directory publication process.
4. To establish a process that ensures an adopted plan can be implemented using the existing coordination network, represented in-part by PASTACC (redefining it as appropriate) and leveraging funds provided through SAFETEA-LU with other Federal and State human services funds.
5. To provide relevant peer examples of coordination that offer fresh ideas to San Bernardino.

6. To ensure that a proposed plan is consistent with the developing coordination regulatory requirements of SAFETEA-LU.
7. To devise a strategic plan for coordination of public transit and human services transportation: specific elements shall relate to the San Bernardino Valley, the Victor Valley and the four rural subareas of the County, following the flow of transportation and human services dollars to these regions; some countywide elements are envisioned; the overall plan shall be responsive to the particular conditions of San Bernardino County and set forth necessary roles, responsibilities, activities, projects and funding.

### **Task 1 Establishing a Process to Promote Coordination**

The PASTACC [*Public and Specialized Transportation Advisory and Coordination Council*] shall be an initial, but not necessarily exclusive forum for promoting public transit-human services transportation coordination. A methodology for encouraging coordination dialogue, including outreach, shall be developed for the course of the study that meets two purposes:

1. there shall be oversight and guidance provided through the study process by a technical advisory group that shall include members from the proposal selection review process;
2. there shall be effort made to include higher level participation in dialogue about public transit-human services transportation coordination opportunities for San Bernardino, possibly establishing special briefings, high-level workshops or other mechanisms to invite and encourage participation of department heads, agency heads and others who impact the systems issues of San Bernardino County

Where possible, efforts should be made to involve key stakeholders in as many points as reasonable throughout the course of the study. There may be some overlap between this task and Task #4, Focused Public Involvement and Community Outreach.

Product: Technical memo on the coordination process approach.

### **Task 2 Extending the Inventory of Existing Community Transportation Resources**

We have an extensive and current inventory of community transportation resources, published annually as a directory of both providers and non-providers and includes non-profit, public and for profit entities. Both groups of agencies are the focus of this task: those “providing transportation” and those “serving clients with transportation needs but not providing transportation”. Historical AB 120 Social Service inventory data exists for many of the agencies listed in San Bernardino County's Public and Specialized Transportation Directory. Appendix C includes the current survey form used to update directory listings. The **2005/2006 San Bernardino County Directory of Public and Specialized Transportation**, includes 321 organizations, of which 148 agencies are providing, contracting or subsidizing transportation and of which 82 agencies are directly operating approximately 400 vehicles. The county's six local public transit programs operated about 425 vehicles collectively.

Available inventory information should be reviewed with a methodology developed to address the questions enumerated below. The full inventory database will be provided to the successful

consultant. Site visits should be planned for the seven public transit operators and the larger human services transportation providers that are not attached to or connected with the county's public transportation network. For-profit commercial transportation operators, including MediCal providers, shall be included in this inventory process to the extent that these are identified and existing service provision information confirmed. But the focus of this task should be predominately on both the existing public transit systems and the public or private, non-profit agencies providing community-level human services transportation.

2.1 Organizational Issues. Specifically what funding sources are currently supporting transportation within San Bernardino County other than dedicated federal and state transportation dollars? By County subarea: Which organizations are currently providing transportation? Which organizations have an interest and willingness to continue or to broaden their transportation function? Which organizations serve clientele who require the largest numbers of human services transportation trips and users? Which of these organizations are the major stakeholders in public transit and human services transportation? With respect to costs, how are organizations budgeting and funding their services and how effectively are transportation providers capturing or identifying their full costs of providing service?

2.2 Consumer Needs. Questions about the consumers should be addressed, including at minimum, the following by County subarea: What human services transportation needs exist and how can these be categorized in terms of trip purpose, trip length and frequency? What areas of unmet transportation need exist and can be anticipated? What types of special requirements exist so that these trips cannot be made on the existing public transportation network of scheduled fixed-route and rail service within San Bernardino County? To the greatest extent possible, needs should be quantified. Needs should be identified by the subareas of San Bernardino County: San Bernardino Valley, the mountains (Lake Arrowhead to City of Big Bear Lake), Victor Valley, the high desert from Barstow to Needles, and the Morongo Basin (Joshua Tree, Yucca Valley and Twenty-nine Palms).

2.3 State and Federal Funding Streams into San Bernardino County Of the 64 identified Federal level funding streams for which transportation is an allowable expense, identify those utilized in San Bernardino County, and, of those, which may or may not be supporting human services transportation? Which organizations are included or should be added to the inventory? The emphasis on this subtask should be on the larger, more readily identifiable Federal and State funding sources that may be used for human services transportation. This subtask's purpose is not to track every single last one of the 64 programs identified, but to establish the State and Federal human services transportation funding coming into San Bernardino County that can be leveraged with SAFETEA-LU funding (Sections 5310, 5316 and 5317).

2.4 GIS Mapping Activity To the extent possible inventory data shall be presented in GIS formats, to assist with the public transit-human services transportation coordination planning process. Data may be presented for sub-groups or single agencies or selected areas, depending upon what data is obtained and what GIS applications will present the available information. The purpose of this subtask shall be to develop examples specific to San Bernardino County that show the power of geographic information mapping in informing stakeholders about public transit-human services transportation coordination planning issues.



Products: Extended inventory with analysis of inventory, consumer needs and human services transportation funding findings countywide and by subarea, including GIS maps of relevant information.

### **Task 3 Demographics and Demand**

Recognizing that increasing population is one of this County's significant characteristics, various demographic analyses shall be conducted.

3.1 Census Analysis An analysis of 2000 census data shall be prepared by sub area, and by community within sub area, focused on various measures reflective of transit dependency, including age distribution (percentages in various senior categories), vehicle ownership, income levels, ethnicity, single households with children or over 65, percentage with disabilities, population density and any other variables of potential value. This information shall be used in developing strategies by sub-area. Presentation of selected variables in GIS format is desirable.

3.2 Public Transit and Human Services Transportation Demand. A demand projection shall be developed to anticipate public transit and human services transportation demand in each subarea for the next four years. Demand estimates include information about the trend in the current number of public transit trips provided (ACCESS and other demand response services), trips made by human services organizations, and any gaps between current and future public transit-human services trip need. Demand by County subarea should be presented both in terms of raw trip estimates and trips per capita.

Products: A summary of census variables predictive of specialized transit need by subarea; a demand estimation for public transit and human services transportation demand for a four year period; and identification of existing or future service gaps.

### **Task 4 Identify Coordination Models from Around the Country Applicable to San Bernardino County**

Models of public transit and human services transportation coordination activities and coordination structures from elsewhere should be identified. Information about best practices or coordination models should be selected with the realities of San Bernardino County experience in mind. Part of the dilemma that San Bernardino County faces is its considerable size, with the mix of substantial desert, isolated communities and the two urbanized areas with fast-growing populations. The rationale for selecting specific models should be described. Information about selected models should include, but not be limited to, identifying the objective of the program or activity described, identifying the measures of success used in that environment, identifying those variables that appeared to enable the system or organization to succeed. Models selected should focus in two areas:

- 1) organizational structures that could be considered for the County subareas;
- 2) specific coordination functions that address needs identified in the County subareas.

SANBAG staff will review and concur on selected models for inclusion in the study. Topics addressed by the models may include, but should not be limited by:

- coordination in similarly sized or expansive rural/ urban areas
- brokerage or mobility-management models appropriate to the County subareas
- use of alternative service models to maximize the resources of public transit and human services transportation providers within and between the County subareas
- expanding the role of volunteers
- trip specific models related to non-emergency medical transportation or adult day care/ adult day health care
- technology applications
- information service applications

Benefits and any outcome measure information of these models or functions should be identified. Costs, weaknesses and special requirements should also be identified.

This product of this task has value as a stand-alone element to be shared with stakeholders to promote and educate persons, helping them see the possibilities and benefits of coordinating public transit and human services transportation.

Product: Report of coordination models depicting structures and functions relevant to each of the County subareas.

## **Task 5 Focused Public Involvement and Community Outreach**

This task is to bring qualitative information that extends and deepens the findings of the inventory process through a focused public outreach effort. It should also be constructed in such a way that it helps to build a network of contacts and agency personnel with related concerns about public transit and human services transportation. The consultant should utilize, as appropriate, the tools set forth in the *Coordination Framework for Action* and planning guidelines of the United We Ride initiatives.

5.1 Agency Head and Opinion Leader Outreach San Bernardino County's First Five dialogue of 2003/2004 established a model for inviting and sustaining the participation of high level persons, including executive directors, agency heads and county department level directors. The consultant team is asked to develop strategies and methods by which to encourage highest level participation in dialogue and discussion by which to identify public transit and human services transportation coordination issues and needs in San Bernardino County. Such outreach shall include public transit providers; private transportation providers, including taxi services and intercity bus operators; human service agencies funding or supporting transportation programs for targeted populations; and other government agencies that administer health, employment, or other support programs for targeted populations; non-profit organization that serve the targeted populations for transportation services; advocacy organizations working on behalf of targeted populations; security and emergency management agencies; any other appropriate state or local officials; tribes and tribal representatives; representatives of the business community; community-based organizations; economic development agencies; and elected officials.

5.2 Consumer Representation Selected focus group activity should be designed to gather groups that reflect particular market niches for public transit and human services transportation. These shall include, but not be limited to: **low income persons** including such groups as single women with children, seniors or the medically indigent

who arrive at emergency rooms for health care; **individuals with disabilities**, including those who are working or attending school, those who are isolated or shut-in; **elderly individuals**, including those who live alone, can no longer drive, or are caretaking an aging spouse; **chronically ill persons** such as those on dialysis or frail elderly individuals who are living at home.

Focus group discussions can be with consumers directly, or with persons who represent them, such as family members, or those who work with the targeted consumer groups, such as social workers or emergency room workers. The methodology for developing focus group participation should be described, as well as any requirements of the PASTACC membership in assisting the consultant team.

**5.3 Public Workshops** When the draft report is available, the consultant shall conduct public workshops in the West San Bernardino Valley, East San Bernardino Valley, the Victor Valley and in the four rural subareas (a minimum of seven workshops). The consultant shall work with PASTACC staff to develop the invitation and identify workshop invitees. PASTACC staff can be responsible for the invitation process with the consultant responsible for the design and conduct of the workshops. Participation by SANBAG staff, PASTACC staff and/or PASTACC membership at the workshops is expected.

Products: Stakeholders listing, Report of findings from outreach efforts.

## **Task 6 Identify and Address Barriers, Duplication of Services and Service Gaps**

Draw from the inventory and outreach efforts: the types of issues or problems that constitute barriers to public transit and human service transportation coordination in the six County subareas; identify if any duplication of service exists; and to characterize the gaps in the provision of transportation service.

- **Barriers** should encompass both those experienced by individual agencies that keep them from providing their own transportation or working in concert with others to meet mobility needs, but also should identify inter-organizational issues for San Bernardino County agencies that impede progress on public transit and human services transportation coordination. Identify methods for removing or minimizing perceived and/or real barriers to coordination.
- **Duplication of service** may include identifying multiple carriers (both for profit and not-for-profit) that are making similar trips and could conceivably be coordinated in some fashion or arrangements made for service provision in a shared cost manner – for example, specialized transit trips from the Victor Valley or from the mountains region to the medical facilities in the San Bernardino Valley are most problematic. If limited duplication can be identified, this too should be described. Identify coordination actions to eliminate or reduce any duplication of services found.
- **Service gaps** should be identified and this can be done geographically, temporally, in terms of types of passenger assistance required and another other means that best describes identified gaps, if in fact these exist. Develop strategies to address identified gaps.

Product: Report on identification and recommended solutions to barriers, service duplication and service gaps.

## **Task 7 Funding**

The consultant shall describe existing and future funding sources, of the greatest breadth possible, for funding future coordination activities for San Bernardino County. Requirements to secure targeted funding shall be identified.

Federal Funding Financial resources to support existing or future coordination of public transit and human services transportation shall be documented. At the time of this writing, while funding marks are generally known for the San Bernardino County regions under SAFTEA-LU programs of New Freedom (§ 5316) and Jobs Access and Reverse Commute (§ 5317), the regulatory guidance for these funds has not yet been completed. Clearly this plan should be constructed to enable San Bernardino County maximize its use of SAFETEA-LU funding directed at supporting public transit and human services transportation coordination.

State Funding California's Transportation Development Act Article 4.5 can be used to support CTSA functions (*consolidated transportation services agency*) functions and is potentially available in some if not all of the County subareas. There are other new and/ or continuing funding initiatives at the state level with relevance to human services transportation that should be identified.

Local Funding At the local level, the voters of San Bernardino County reauthorized the Measure I half-cent sales tax and the twenty-year plan commencing in 2010 continues the exiting Measure I funding but includes a new funding source for coordinated specialized transportation activities in the San Bernardino Valley. Measure I also continues designated funding in the Mountain/Desert subareas for transportation for elderly individuals and individuals with disabilities.

This task should also identify other funding sources currently in use for human services transportation within San Bernardino County, even where these dollars cannot be specifically identified by line item detail from within a larger agency budget, but nonetheless the organization's funding source(s) contributes to operation of a transportation service.

Future Funding Opportunities. Future funding sources to undergird coordinated transportation functions, including local, State and Federal, should be enumerated as well as the requirements of these funding sources, to the degree that these are known. The product of this task should identify what will be necessary to secure these funds.

Product: Report of funding opportunities that can be used to support the public transit and human service transportation coordination effort and any funding requirements, presenting highlights in matrix formats.

## **Task 8 Draft Strategic Plan and Coordination Strategies**

This task utilizes findings from the preceding tasks to build a draft strategic plan for coordination of public transit and human services transportation within and between the various subareas of San Bernardino County. The plan has to accommodate both service needs and financial

opportunities but should not be so constrained by existing resources that a vision cannot be identified. The plan is to be designed with discrete elements focused on the San Bernardino Valley, the Victor Valley and the four rural subareas of the county, reflective of the anticipated flow of SAFETEA-LU funding. There may be selected countywide responsibilities or activities delineated in the plan, as well as those specific to subareas.

The plan should include specific goals to guide short-term and longer-term developments. These goals should be developed for the county as a whole. Short-term objectives shall be identified and these may vary from one subarea to the next.

The strategic plan should describe the organizational arrangements necessary to further the provision of coordinated public transit and human services transportation. It is expected, based upon prior work, that some type of infrastructure is needed to support and encourage the breadth of coordination transportation options possible. The strategic plan should propose a mechanism or structure -- including possible alternative structures -- that are most likely to meet general goals of improving mobility, achieving cost-effectiveness and achieving a sustainable level-of-effort for coordinated public transit and human services transportation in San Bernardino County.

It is important too that the plan provide a prioritization of implementation strategies, assuming that whatever funding levels are secured will not be sufficient to fund all possible projects. Therefore the strategic plan should provide guidance, built up from the study findings from the demand estimation, analysis of existing resources (both physical and financial), addressing methods to remove or minimize barriers, methods to avoid or minimize duplication and address service gaps, on how to prioritize coordination programs, projects and/or initiatives as well as identify the revenues resources required. It is critical that recommended programs, projects and/or initiatives be sustainable over time and not be a one-time award of scarce resources.

Roles and responsibilities should be delineated in relation to proposed objectives and programmatic approaches, at both the countywide and subarea levels. The strategic plan should address short-term, achievable activities as well as provide longer-term direction for continuing planning processes.

The draft strategic plan should be provided in .pdf formats for wide distribution for input and comment. Some paper copies of plan summaries will be necessary for workshop distribution. The schedule should include opportunity to present the draft strategic plan for coordinating public transit and human services transportation in San Bernardino County in at least seven workshop venues within the county, as discussed in Task 5, at PASTACC and including at least one presentation to the SANBAG Plans and Programs committee. Consultant recommendations on the best strategies for obtaining input on the draft strategic plan are requested.

Products: Draft coordination strategic plan, strategies, and proposed projects with opportunities for review.

## **Task 9 Final Draft of Coordination Strategic Plan and Action Plan**

Receiving input from key constituencies on the draft strategic plan, modifications should be made and issues addressed to devise the final strategic plan. The strategic plan should then be translated into an Action Plan, identifying responsible parties, projects and timetables, to the

greatest extent possible. The action plan should provide additional levels of detail in the following areas:

- **service characteristics directly related to users** – such as type of service, methods of user activation, assistance on vehicles, reservation times, routes or corridors, hours and service areas, fares
- **operational system characteristics** – such as the number of vehicles, communications equipment, and number and type of personnel, including the roles of paid and unpaid staff
- **administrative features** – identifying who will manage the services, who will supervise and how the service will be funded

Included with the final report will be an executive summary that has the potential to be a stand-alone document that can be more widely distributed. The final report and all study products shall be provided in .pdf-style formats so that these can be made available on SANBAG's website. Fifty (50) bound documents of the study's final report shall be provided. The final report shall be presented to the SANBAG Plans and Programs Committee as well as the SANBAG Board.

Products: Final coordination strategic plan with stand-alone executive summary; .pdf file of final report; Fifty (50) bound copies of the final report.

#### **D. PROPOSED RFP AND SCOPE OF WORK SCHEDULE**

Release of Request for Proposals	August 2, 2006
Requests for Clarifications	August 18, 2006
Response to Requests for Clarifications	August 28, 2006
Proposals Due to SANBAG	By no later than 4:00 p.m. September 8, 2006
Possible Consultant Interviews	September 25, 2006
Recommendation to Award – SANBAG Plans and Programs Committee	October 18, 2006
Recommendation to Award – SANBAG Board	November 1, 2006
Notice to Proceed	November 3, 2006

The study's duration is expected to be no longer than twelve months. Milestones shall be identified by the consultant.

Requests for Clarifications shall be submitted in writing or email format up to the close of business on August 18, 2006. Responses to the Requests for Clarifications shall be posted on the SANBAG web site by the close of day on August 28, 2006.

## E. SUBMITTAL OF PROPOSALS

Interested firms are to submit one original and seven (7) copies of their proposal by 4:00 p.m., Friday, September 8, 2006. Proposals shall be addressed as follows:

San Bernardino Associated Governments  
Attn: Michael Bair, Director of Transit and Rail Programs  
1170 W. 3<sup>rd</sup> Street, 2<sup>nd</sup> Floor  
San Bernardino, CA. 92410-1715

(909) 884-8276

Proposals shall be comprised of the following:

1. Proposal Transmittal Letter – Not to exceed two pages and identifying the individual responsible for committing the firm.
2. Proposed Scope of Work in Response to the RFP – Scope shall address the firm's understanding of the work to be performed, including identification of specific tasks, timelines and work effort (personnel hours by task). Proposing firms are encouraged to identify opportunities to perform the work in the most cost effective manner.
3. Qualifications of the Firm(s) – Experience of the firm in conducting similar type studies within the past five years. This section should be limited to no more than 15 pages. If subcontractors are to be used, provide brief statements of similar type work performed within the past five years.
4. Qualifications of Proposed Staff – Include a brief resume of proposed staff accompanied with the identification of similar work the proposed staff has participated in within the past five years. The same information should be provided for any subcontractors.
5. Project Management – Provide an explanation of the project management system and practices used to assure that the project is completed within the scheduled timeframe and that the quality of the products will meet SANBAG's requirements.
6. References – Provide at least three references for whom the firms have provided similar work within the past five years. Client contact person name, with address and telephone number are to be provided. References for subcontractors shall also be provided.
7. Cost Proposal – Proposing firms are to prepare a cost proposal that includes a breakdown of expenses by proposed task. The cost proposal shall include all items that will be charged to SANBAG, including travel and other direct charges that will be involved in the project. Costs shall be segregated to show staff hours, rates and classification and administrative overhead. If subcontractors are to be used, the prospective contractor must indicate any mark-up.

## **E. BUDGET**

The SANBAG Board has approved a budget of \$150,000 for the development of the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County.

## **F. CONTRACT TYPE**

A cost-reimbursement not-to-exceed type of contract is anticipated. A ten percent retention will be held by SANBAG and released upon the successful completion of the work to be performed. The consultant will be paid based on work actually performed during the preceding month. The consultant should forward monthly invoices by the 15<sup>th</sup> of the following month. Each invoice shall be accompanied with a brief description of the work performed, identify any problems incurred and include suggested remedies in order to keep the project on schedule. Each invoice shall identify the total contract amount, the amount previously invoiced, the amount of SANBAG retention for that invoice and held to-date, and the remaining balance of the contract.

## **G. SANBAG CONTACT PERSONS:**

Questions related to this RFP should be directed to the following individuals:

Primary Contact:

Michael A. Bair, Director of Transit and Rail Programs  
San Bernardino Associated Governments  
Phone (909) 884-8276, Ext 116  
Fax (909) 885-4407  
Email [mbair@sanbag.ca.gov](mailto:mbair@sanbag.ca.gov)

## Appendices

Appendix A – Map of San Bernardino County Subareas

Appendix B – Health Access Study Summary of Findings and Recommendations

Appendix C - Survey Form for Annual Survey of Specialized Transportation Providers



## Appendix A – San Bernardino County Subarea Map

## APPENDIX B

### **Health Access in San Bernardino and Riverside Counties: Non-Emergency Medical Transportation (NEMT) Needs and Resources**

Caltrans/ Federal Transit Administration S. 5313  
Study of Statewide Planning Significance  
*Winter 2003 to Winter 2005*

#### **Project Management Team:**

Caltrans, Southern California Association of Governments, San Bernardino Associated Governments, Riverside County Transportation Commission, Inland Empire Health Plan, Kaiser Permanente, Molina Health Care, Health Net, Community Hospital of San Bernardino

#### **Consultant Team:**

**Judith Norman – Transportation Consultant (JNTC)**

*In association with:*

O'Melia Consulting

Civic Technologies, Inc.

David Raphael- Medical Transportation Consulting

Medical Transportation Management, Inc.

UCLA Center for Health Policy Research

The Fairfax Research Group

#### **Project Development Team:**

25+ health care, public transit agencies and community based organizations in Riverside and San Bernardino Counties' Inland Empire

#### **Overall Project Goal:**

To identify solutions to non-emergency medical transportation in these two expansive counties, through a regional planning study, by rigorously documenting issues and devising solutions, refined by community input, that are implementable through partnership between the transit and health care industries.

#### **Project Components:**

*Project Management Team* (funding sponsors) and *Project Development Team* (other stakeholders)

Consultant study by JNTC and team

Way-finding maps of medical facilities for bus riders

Conference in March 2005 to report, disseminate findings, engage in dialogue, prepare proceedings.

#### **JNTC Study Objectives:**

- Identify NEMT trip needs
- Quantify NEMT need in geographic areas
- Describe available resources and potential barriers
- Devise recommendations to meet geographic area needs with identified resources
- Identify challenges of NEMT geographic areas potentially applicable to other areas of Calif.
- Facilitate continuing education of project stakeholders regarding issues and potential solutions to NEMT.

#### **Study Elements:**

- Stakeholder interviews and focus groups
- Resource analysis of transportation services
- Review of state and national NEMT models
- Examination of funding resources and barriers
- Household telephone survey
- Geographic information system (GIS) analysis of multiple data sets.
- Analysis and direction

#### **Four Organizing Questions:**

1. Is there currently a need for non-emergency medical transportation to medical appointments for consumers residing within the study areas?
2. If the need exists, what segment of the population is demonstrated to have the greatest need for non-emergency medical transportation in the study areas?
3. Where in the study areas does the target population reside?
4. To what extent does the target population have access to public transit as a transportation alternative to get to medical appointments?

Study process and findings, significantly affected by the *Healthcare Insurance Portability and Accountability Act* (HIPAA), made it premature to develop the anticipated transportation demonstration projects. Importantly, the project has refined our understanding of NEMT issues, to better inform both healthcare and transportation stakeholders. Policy direction to address the needs identified requires continued dialogue by all parties involved, at local and state levels.

### Selected Overall Findings:

- *Population segments have missed medical appts.* due to lack of transportation, including those with their own transportation and those depending upon others for transportation.
- Demographic characteristics of those missing appts. due to transportation are: **women, 25 to 34 years of age, household incomes of less than \$20,000, MediCal recipients and Spanish speakers.**
- *Seniors appear to be getting to* scheduled medical appts., missing or rescheduling fewer medical appts. than other age groups.
- The San Bernardino Valley area surfaced as the destination target area for most medical appointments while the populations missing appointments **reside primarily in the rural areas of the two counties.**

### Healthcare Related Findings:

- State level data suggests that **California's NEMT policies** are not on par with those of other states. Program based upon physical ability and not economic need or the availability of transportation alternatives.
- Nationally, **operating NEMT programs** continue to rest on the shoulders of healthcare organizations due to Medicaid funding policies.
- Confusion and differences in the interpretation of **HIPAA requirements** limited the amount of healthcare related data collected and analyzed in this study.
- Wide variations in the levels and methods of **reporting NEMT transportation expenses** in California make it difficult to determine financial resources targeted to transportation by healthcare organizations.
- **Missed appt. data** is the most important factor for assessing the severity of NEMT need but is not currently collected by healthcare organizations.
- **Lack of funding** is cited by stakeholders as number one barrier to direct NEMT provision.
- **Perceived success** of NEMT programs operating across the country relates to ability to focus on the target population and consolidate administration, rather than cost per trip, and to obtain adequate financial resources.
- **Significant cooperation between healthcare and transit** is necessary to ensure successful and cost-effective NEMT programs.

### Public Transportation Related Findings:

- Access to public transit services for IEHP members is very good. Data shows that IEHP population segments are **in most cases close to public transit, within ¼ mile walking distance** from home to a transit stop.
- Although 57% of the total study area population is **within ¼ mile of fixed-route service**, only 31% of the population lives **near high frequency routes** (15 to 30 minute headways).
- Vast majority (93%) of **IEHP facilities are located within ¼ mile of fixed-route services.** Nearly half (45%) of IEHP facilities are located within close proximity to high frequency transit routes. These facilities generate demand for 63% of NEMT trips of IEHP cases analyzed.
- **Dial-a-Ride and ADA-related services** are operating in each area for eligible seniors and persons with disabilities, but not to those identified as having difficulty getting to appointments, suggesting [CTSA] transportation brokerages as one possible options.
- Public transit connections medical destinations outside the local areas are limited. **Inter-regional connectivity** needs significant improvement.

### Conclusions:

- The State of California should consider the overall impacts of its current funding policies and practices relative to NEMT.
- The State's policies and practices relative to funding medical transportation under MediCal are inconsistent with other states and contrary to Federal regulation.
- The issue of allowing expenditure of MediCal funding for NEMT for low-income MediCal recipients must be recognized and accepted as a critical core issue in the State's efforts to identify and further local efforts to address NEMT needs.
- Rapidly changing socioeconomic conditions of the Inland Empire do suggest that in-depth "destination-based" information about missed appts. would logically assist transit operators in developing services that better replicate travel patterns of study area participants.
- Destination-type data could be collected as part of ongoing transit data collection efforts to serve as a valuable tool in designing more productive services, based upon demonstrated demand.
- There is no one answer, no one-time answer; each recommended action serves to support the overall objective addressing NEMT needs.

## APPENDIX C

[Page one of a two page survey with second page collecting vehicle inventory information.]

### SAN BERNARDINO SPECIALIZED TRANSPORTATION

Summer 2005

Contact \_\_\_\_\_

Agency Name: \_\_\_\_\_

Title: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone/Ext: \_\_\_\_\_

Fax: \_\_\_\_\_

1. Please give us a couple of sentences about your program, the services provided and the client population you serve in terms of age, disability or other special characteristics. You may write it here or attach a brochure or flyer.

2. YOUR AGENCY TYPE (please check one only):

- ☐ Private, for profit      ☐ Private, non-profit  
☐ Public Agency      ☐ Church affiliated  
☐ Tribal organization

3. NUMBER OF ACTIVE CLIENTS ON YOUR AGENCY'S ROSTER LIVING WITHIN SAN BERNARDINO CO.:

\_\_\_\_\_ # total enrolled clients / consumers  
\_\_\_\_\_ # average daily attendance  
\_\_\_\_\_ site daily who require transportation assistance  
\_\_\_\_\_ # est. in wheelchairs daily

4. WHICH BEST DESCRIBES ANY TRANSPORTATION SERVICE PROVIDED BY YOUR AGENCY:

(please check all that apply):

- ☐ NO TRANSPORTATION provided, purchased, or arranged.  
☐ PROVIDING transportation with full responsibility for the transportation by this agency.  
    ☐ Vehicles owned/leased with paid drivers  
    ☐ Vehicles owned/leased with volunteer drivers  
    ☐ Privately owned vehicles with paid drivers  
    ☐ Privately owned vehicles with volunteer drivers  
☐ CONTRACTING for transportation with services provided by another entity under contract to this agency.  
☐ SUBSIDIZING transportation through agency purchase of passes, fares or mileage reimbursement.  
☐ ARRANGE FOR transportation by assisting with information but clients responsible for follow-up.  
☐ Other, please specify:

*If you answered NO TRANSPORTATION to #4, please stop here and return the survey form in the enclosed envelope. Otherwise, please continue. Thank you very much.*

5. TRANSPORTATION SERVICES ARE PROVIDED TO:

(please check one only):

- ☐ Any person served by agency  
☐ Only to formally enrolled agency clients  
☐ Clients authorized/approved for purchased transportation  
☐ General Public  
☐ Other, please specify \_\_\_\_\_

6. TRANSPORTATION SERVICE AREA:

☐ Throughout San Bernardino County

Please describe service area, listing cities, if appropriate

☐ Within a \_\_\_\_\_ radius of \_\_\_\_\_

7. DAYS AND HOURS OF OPERATION:

Operating Hours      First Pick-up      Last Pick-up

Weekdays:

Saturdays:

Sundays:

8. HOW MANY VEHICLES DO YOU HAVE FOR CLIENT TRANSPORTATION? \_\_\_\_\_

9. HOW ARE TRIPS REQUESTED? (please check all that apply)

- ☐ Immediate request/ same day  
☐ 24 hour advance reservation  
☐ Up to one week advance reservation  
☐ More than one week advance reservation

10. CURRENT YEAR TRANSPORTATION BUDGET:

What is your agency's estimated annual transportation expenditure for the current fiscal year: administrations, operations, and vehicle costs

\_\_\_\_\_ current FY trans. administration budget:

\_\_\_\_\_ current FY trans. operating budget:

\_\_\_\_\_ current FY vehicle / capital budget:

PLEASE RETURN TO: SANBAG Directory, c/o AMMA, 306 Lee Ave., Claremont, CA 91711-3123

Voice (909) 621-3101 Fax (909) 621-9387 E-Mail: amma306@earthlink.net